

Reporting and financial tracking issues resolved by technology-enabled service from Harbor

"As if someone turned on the light switch, we can make decisions based on usage data. It helps with both renewal or cancellation decisions and adjusting the price we pay for accessing various services."

Chief Knowledge Officer of New York-based Am Law 15 firm

A global Am Law 15 firm enlisted Harbor to assist in automating commodity reporting functions and streamlining spend management while instituting a more significant, firm-wide change around financial tracking.

Siloed data and limited reporting

Before engaging with Harbor, the firm found it challenging to manage siloed sets of financial data due to multiple financial cubes (tools that permit data analysis in multiple dimensions), inconsistent data entry methods, and limited automated reporting. The firm greatly needed a solution to streamline manual, time-consuming tasks and reduce the complexity around managing resources, platform usage, contracts and spending into a single interface.

A new approach

Harbor conducted a holistic analysis of the firm's knowledge systems and identified new opportunities related to people, processes and technology.

To improve upon the firm's data management practices, Harbor implemented its technology-enabled service, SpendConnect for Research & Information Solutions.

Simplifying tasks and centralizing data

To address concerns about the misinterpretation of data due to disconnected platforms, Harbor identified four consistent problem areas.

Firstly, the firm dealt with the manual and labor-intensive processes used to create its weekly reports. By using the



reporting feature of SpendConnect, it could automate report creation and undertake quick changes to charts to meet stakeholders' evolving needs. Data model adjustments are now much simpler, allowing the firm to lean on the tool for instant analysis.

Secondly, it centralized its data for contract management. SpendConnect provided data-driven insights into platform usage, spend, contracts and demographic information that now allows the firm to evaluate where they are getting the most value out of their contracts at a granular level.

Thirdly, it created visibility into user and demographic habits. SpendConnect aggregates data at the user, title, department and location levels. This has allowed the firm to gain insights into each demographic and identify different strategies as they go through the change management initiative.

Finally, the firm created an intuitive UI / UX experience for its end users. The solution provides the firm's staff with an intuitive dashboard with easy-to-use tabs for a more streamlined experience. All charts and tables within SpendConnect can be exported to a spreadsheet with a simple button click.

Data-driven decision-making

In just eight weeks, the Harbor team, with its deep understanding and experience in data-driven decision-making for law firms, worked in collaboration with the firm to integrate an application that drives a higher level of reporting and improved efficiency by reducing manual efforts. As a result, the firm now has more efficient workflows, with reduced time spent compiling information and increased time available to spend on analysis.

By centralizing its data, it has more data integrity and has eliminated the need for multiple files for client-related work. The firm also has greater visibility across the firms, thanks to filters and hierarchies for different departments and attorney locations. This has led to more actionable insights into the firm's contract pipeline, spend and platform usage.

Implementing tech-enabled service

SpendConnect has delivered:

More efficient workflows and less time spent compiling information

Centralized data and improved file management

Greater visibility and more actionable insights



Harbor is a trusted provider of professional services to the world's leading law firms, corporations, and their law departments. With our globally integrated team of industry experts - strategists, technologists, and specialists - we navigate alongside our clients, providing essential resources and invaluable insights to help steer them towards a future where they can thrive.

This engagement was executed by HBR Consulting, one of the companies that merged to form Harbor.